



NAIFA- Florida's Online Service Center Cheat Sheet

To access the NAIFA Online Service Center (OSC), log in to the NAIFA Leaders Center and click on NAIFA Online Service Center under 'Highlights' or visit www.securex.naifa.org/nosc. The following reports for membership numbers, membership list and sponsorship can all be located through the OSC's main page.

Membership Numbers

- To access current membership numbers for your local or state, hover your mouse over the 'Membership Reports' header on the Online Service Center main page.
- You will have several report options but you will likely want to focus on one of the following:
 - 'Counts by State' will allow you to compare states side by side.
 - 'Counts by State (Large)' will allow you to compare Florida with other large states only.
 - 'Counts by Local' will allow you to view membership totals broken down by local associations for each state.

Sponsorship

- To access the current sponsorship list, hover your mouse over the 'Membership Reports' header.
- Choose one of the following reports:
 - 'Sponsorship List' - Full list of all sponsors and their recruitments for the fiscal year. This report will also provide limited information in regards to the new member.
 - 'Sponsorship Counts' - Full list of all sponsors and a count of all sponsorships for the fiscal year. This report does not contain new member information.

Membership Reports

- To access current membership reports for your local or state, hover your mouse over the 'Membership Rosters and Custom Reports' header.
 - Choose 'Member Report' and you will then be directed to the 'Roster Builder' page.
- Choose the type of report you wish to pull.
 - Current Members, Renewal Members, New Members, Lapsed Members (fiscal year only), Deep Lapse Members or Current and Lapse Members
- If you have a specific paid thru date range make sure to enter it in the gray box.
- If you are looking for members in only a certain company choose it from the company drop down in the gray box.
- You can also filter your results by Annual Payers or YATs. Simply check the appropriate box and the reports will filter only these members.
- You will then choose the following:
 - Association Level
 - You will have a choice between a local or state report.
 - Local Association
 - Allows you to pick one local association at a time.
 - If you chose "State" in the Association Level field then this option will not be available.
 - Sort By
 - Last Name,
 - Association, Last Name
 - Company Name, Last Name
 - Zip Code, Last Name
 - Member ID

- A basic membership report will include the following fields:
 - Member ID
 - Local Association
 - Full Name
 - First Name
 - Last Name
 - Designation
 - Email
 - Work Phone Number
 - Primary Company
 - Company Name
 - Preferred Address (Business or Home)
 - Promo Program (Pilot)
 - Promo Program Stage
 - Cong District
 - Paid Thru Date
 - Join Date
 - Reinstatement Date
 - Anniversary Date
 - Auto Draft (Yes or No)
 - For additional information you will need to choose an Additional Output Field Group

- Additional Output Fields Groups
 - To run a report with the member's full address you will need to choose one of the following by highlighting it in the drop down menu and clicking finish.
 - Business Address
 - Home Address
 - Preferred Address

 - You may also opt to include Demographic Fields which includes the following:
 - Birth date
 - YAT member status
 - License Number
 - Manager or Agent
 - Sponsor's name, phone # & email
 - Corporate Bill Program
 - Cancelled*
 - Not Renewing Reason*
 - No Longer in Industry *
 - IFAPAC Fields

- Your final step will be to choose the Output type that you would like your report to run in.
 - Screen Display
 - Roster Display (PDF)
 - Excel (.xls)
 - Broadcast Email

- Once you have chosen your report output type, click the generate report button. Your report should appear on screen or in a separate window depending on the output type.

Questions??? Call us at (850) 422-1701 or email us:

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*applies to lapse reports only